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1991

# **Biennial Evaluation of Vocational and Technical Education**

**Report of**  **Fiscal Years**  
**1989-90**

***MONTANA COUNCIL ON  
VOCATIONAL EDUCATION***

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JAMES W. FITZPATRICK  
EXECUTIVE DIRECTOR

March 1, 1991

TO: Montana State Board of Regents  
FROM: Jon Jourdonnais, Chairman  
Montana Council on Vocational Education  
RE: Biennial Report for the Planning Period 1989 - 1990

The Montana Council on Vocational Education is pleased to submit this report titled, "Biennial Evaluation of Vocational and Technical Education 1989 - 1990," and companion reports titled, "Biennial Evaluation - Adequacy, Effectiveness, and Coordination of JTPA and Vocational Technical Education," and "Maximizing Potential for Vocational and Technical Education." These reports are prepared in accordance with Council mandates specified by the Carl D. Perkins Vocational Education Act (Public Law 98-524), as outlined in the introduction of this report.

The Council extends its appreciation to the numerous individuals, agencies, organizations, and groups for their cooperation during the planning period, including: the Governor; Board of Regents of Higher Education; Office of Public Instruction; Montana Departments of Commerce, Labor and Industry, and Social and Rehabilitation Services; secondary and postsecondary vocational-technical education personnel; Job Training Partnership Coordinating Council; Private Industry Councils; Councils of Commissioners; and program operators and service providers.

The State Council is hopeful these reports will be a valuable resource for assessing current delivery systems and will provide direction for maximizing the potential for vocational and technical education programs in Montana.

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## OVERVIEW OF REPORT AND SIGNIFICANT FINDINGS AND RECOMMENDATIONS

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This Biennial Report was compiled by the Montana Council on Vocational Education (State Council) for the planning period, 1989 - 1990. Information utilized for preparation of this report was obtained from the Board of Regents of Higher Education (State Board), Office of Public Instruction (OPI), Research, Safety, and Training Division of the Department of Labor and Industry, Montana Job Training Partnership Inc., Department of Social and Rehabilitation Services, Job Training and Coordinating Council, Private Industry Councils, support staff, and program operators in JTPA. Specific source documents included: fiscal year expenditure and performance reports, annual and biennial reports, state plans, procedural manuals and documents, requests for proposals, administrative policies and procedures, and other sources. The biennial evaluation includes the following reports: "Biennial Evaluation of Vocational and Technical Education" and "Biennial Evaluation of the Adequacy, Effectiveness, and Coordination of JTPA and Vocational Technical Education." In addition, the State Council prepared several other reports during the planning period.

Each of the biennial evaluation reports contains an assessment, evaluation, and analysis of expenditures and projects in accordance with State Council mandated responsibilities. These reports also include State Council commendations and recommendations for respective sections of the reports.

### Major Findings and Observations:

1. The Carl D. Perkins Vocational Education Act (Perkins Act) and Job Training Partnership Act (JTPA) expenditure of funds in Montana have had a major impact for preparing persons with the knowledge, skill, and competency essential for employment and job placement.
2. Coordination efforts between vocational education and JTPA has significantly improved during the past two planning periods.
3. Several vocational education and JTPA projects were recognized as being exemplary at the national level.
4. JTPA program operators in the two service delivery areas attained all JTPA performance standards in 1990.
5. The quality of projects funded and numbers served under Titles II, Part A and B, and Title III, Parts A and B, of the Perkins Act is commendable as evidenced in Section IV of this Biennial Report.
6. The cooperation between agencies, and the commitment, dedication, and leadership of responsible administrative agency personnel for vocational education and JTPA is commendable.

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7. The efforts of vocational education and JTPA administrative personnel to provide technical assistance to eligible recipients, improve public relations and communications, and refine the request for proposal procedures, is commendable.

Recommendations:

In addition to the recommendations contained in various sections of the Biennial Reports, the State Council recommends:

1. The State Board, Office of Public Instruction, Research, Safety, and Training Division of the Department of Labor and Industry, and the Montana Job Training Partnership, Inc. evaluate staffing needs essential for carrying out the duties and responsibilities of both Acts. Further, the State Council recommends the State Board and Office of Public Instruction review staffing needs for administration, supervision, and evaluation of the total vocational technical education system in Montana. The evaluation should include consideration in the following areas: curriculum and academic affairs specialist for postsecondary level, special needs, guidance and counseling, sex equity, and data collection and assessment.
2. Include a strategic planning and coordinating consortium broadly representative of the public and private sector for the purpose of maximizing the utilization of secondary and postsecondary vocational technical education, JTPA, apprenticeship, adult basic education, and other delivery systems, for meeting Montana's current and future training and retraining workforce needs, and for developing a coordination plan between agencies, vocational education, JTPA, and other service providers.
3. The various agencies responsible for the administration of secondary and postsecondary vocational education, JTPA, and other training institutions and service providers, compile data, i.e., on persons completing training programs, numbers being placed on jobs, impact on economic development in Montana, and distribute to appropriate audiences throughout the state.
4. The State Board and Office of Public Instruction intensify efforts for establishing practices and promoting linkages and partnerships between the public and private sectors.
5. Appropriate vocational education and JTPA personnel continue efforts to monitor funded programs and conduct oversight review for assuring that expenditures were used cost effectively. In addition, appropriate JTPA personnel should determine the impact on youth programs resulting from reduced appropriations.

## INTRODUCTION

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The Montana Council on Vocational Education (State Council) was created, by Executive Order, in 1984, to comply with the Carl D. Perkins Vocational Education Act (Perkins Act), P.L. 98-524. During the fiscal years 1989 and 1990, the State Council's Program of Work addressed all mandates as set forth in the Perkins Act, and three reports were prepared addressing these mandates:

1. Biennial Evaluation of Vocational and Technical Education 1989 - 1990
2. Biennial Evaluation - Adequacy, Effectiveness, and Coordination of JTPA and Vocational Technical Education
3. Maximizing the Potential for Vocational and Technical Education

The report, Maximizing Potential for Vocational and Technical Education, contains an overview of Council activities undertaken to fulfill mandated duties and responsibilities, including reports of public hearings, projects and conferences. In addition, State Council recommendations to the Governor, State Board of Regents of Higher Education (State Board), Office of Commissioner of Higher Education, Office of Public Instruction, and State Board of Public Education are included in this report.

The two Biennial Evaluation Reports for 1989 - 1990, address the State Council mandated responsibility, Section 112(d)(9) of the Perkins Act:

"(A) evaluate at least once every two years (i) the vocational education program delivery systems assisted under this Act, and under the Job Training Partnership Act, in terms of their adequacy and effectiveness in achieving the purposes of each of the two Acts and (ii) make recommendations to the State board on the adequacy and effectiveness of the coordination that takes place between vocational education and the Job Training Partnership Act, and (B) advise the Governor, the State board, the State job training coordinating council, the Secretary, and the Secretary of Labor of these findings and recommendations."

In preparing the two Biennial Evaluation Reports identified above, the State Council followed a format contained in the Common Evaluation Elements developed for State councils by the National Association of State Councils on Vocational Education (NASCOVE). The Common Elements were updated and distributed following a seminar conducted by NASCOVE in conjunction with the U.S. Department of Education regional meeting on Management Information Systems, held August 29-30, 1990, in St. Paul, Minnesota.

The report, Biennial Evaluation -- Adequacy, Effectiveness, and Coordination of JTPA and Vocational Technical Education addresses Sections II and III of the Common Elements:

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## Section II. Job Training Partnership Act

- A. Populations with Serious Barriers to Employment
- B. Performance Standards

## Section III. JTPA/VEA Coordination

- A. Public Education Delivery System
- B. Local Coordination

This report, Biennial Evaluation of Vocational and Technical Education, addresses Section I of the Common Elements:

## Section I. Carl D. Perkins Vocational Education Act

- A. Accessibility for Special Populations
- B. Set Asides for Special Populations
- C. Funding Formula for the Disadvantaged/Handicapped
- D. Private Sector Involvement
- E. Allocation of State Allotment

## SECTION I

### CARL D. PERKINS VOCATIONAL EDUCATION ACT

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The purpose of the Carl D. Perkins Vocational Education Act (Perkins Act), P.L. 98-524, is to strengthen and expand the economic base of the Nation, develop human resources, reduce structural unemployment, increase productivity, and strengthen the Nation's defense capabilities by assisting the states to expand, improve, and update high-quality programs of vocational technical education, and for other purposes.

#### Specific Purposes of the Perkins Act:

- Assist the States to expand, improve, modernize, and develop quality vocational education programs in order to meet the needs of the Nation's existing and future workforce for marketable skills and to improve productivity and promote economic growth.
- Assure that individuals who are inadequately served under vocational education programs are assured access to quality vocational education programs, especially individuals who are disadvantaged, who are handicapped, men and women who are entering non-traditional occupations, adults who are in need of training and retraining, individuals who are single parents or homemakers, individuals with limited English proficiency, and individuals who are incarcerated in correctional institutions.
- Promote greater cooperation between public agencies and the private sector in preparing individuals for employment, in promoting the quality of vocational education in the States, and in making the vocational system more responsive to the labor market in the States.
- Improve the academic foundations of vocational students and to aid in the application of newer technologies (including the use of computers) in terms of employment or occupational goals.
- Provide vocational education services to train, retrain, and upgrade employed and unemployed workers in new skills for which there is a demand in the State or employment market.
- Assist the most economically depressed areas of a State to raise employment and occupational competencies of its citizens.
- Assist the State to utilize a full range of supportive services, special programs, and guidance counseling and placement to achieve the basic purposes of this Act.
- Improve the effectiveness of consumer and homemaking education and to reduce the limiting effects of sex-role stereotyping on occupations, job skills, levels of competency, and careers.
- Authorize national programs designed to meet designated vocational education needs and to strengthen the vocational education research process.

## SECTION II

# MONTANA'S VOCATIONAL TECHNICAL EDUCATION DELIVERY SYSTEMS

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### GOVERNANCE FOR VOCATIONAL TECHNICAL EDUCATION

The Perkins Act requires any state desiring to participate in the vocational education program authorized by the Act, to designate a state board of vocational education. In 1987, the Montana Legislature designated the Board of Regents of Higher Education (State Board) as the sole state agency with responsibility for development and implementation of the State Plan and for the administration of activities relative to the Perkins Act. House Bill 39, the enabling legislation designating the sole state agency, directs the State Board to contract with the Superintendent of Public Instruction for the administration and supervision of K-12 vocational education programs, services, and activities. A copy of this two-year contract, initiated in 1987, was included in the Montana State Plan for Vocational Education for the fiscal years 1989 and 1990, and a newly executed contract was included as an amendment to the State Plan when this contract expired in 1989.

### SECONDARY VOCATIONAL EDUCATION

#### Enrollment in Secondary Vocational Education:

Vocational education programs were offered in 85% of the Montana high school districts during the school years 1988 - 89 and 1989 - 90. Programs were offered in the following areas with enrollment as indicated for fiscal years 1989 and 1990:

<u>Vo-Ed Program</u>	<u>Enrollment</u> <u>1988 - 89</u>	<u>Enrollment</u> <u>1989 - 90</u>
Agriculture	2,817	3,419
Business	12,456	15,051
Home Economics	7,320	12,473
Marketing	1,575	1,308
Industrial Arts	5,726	9,933
Trades and Industry	<u>4,276</u>	<u>5,073</u>
Total Enrollment	34,170	47,257

Enrollment figures for these years were obtained from the Office of Public Instruction. These figures do not indicate the number of students served in vocational education in Montana high schools, but are enrollments in programs. In some cases, duplicate counts occur where students enrolled in more than one service area or enrolled in a class which is a two-hour block. The enrollment for 1989 - 90 is further "skewed" because junior high school and middle school enrollment in vocational education classes was included.

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### Funding for Secondary Vocational Education:

In 1981, the Montana Legislature, by passage of House Bill 618, provided funding for Montana's secondary vocational education programs. These funds were used to pay a portion of those costs that exceeded the cost of typical classrooms and were used for the following categories: major equipment, minor equipment, equipment repairs, supplies, vocational student organization advisory stipends, extended contracts, and instructional travel. State funds, plus expenditures at the local level were beneficial to local educational agencies in meeting "match" requirements and contributed significantly in meeting Montana's goals for the planning period. The 1987 Legislature eliminated funding for secondary vocational education for the 1988 - 89 biennium, however, secondary vocational education was funded for the 1990 - 91 biennium at \$1,800,000. In addition, the Office of Public Instruction was successful in obtaining funding from the Legislature for the vocational education component of special education programs.

### Goals for Secondary Vocational Education:

Goals developed by the Office of Public Instruction for inclusion in the Montana State Plan for Vocational Education, fiscal years 1989 - 90 were:

1. Promote Equality of Opportunity
  - (a) Vocational education opportunities will provide equal access for special populations.
  - (b) Vocational education opportunities will receive greater state funding.
2. Promote Effective Use of Technology
3. Strengthen the Quality of Secondary Vocational Education Teachers, Counselors, and Administrators
4. Promote Curriculum Development Activities and Processes
5. Initiate Competency Testing for Secondary Vocational Education Completers/Concentrators
6. Promote the Development and Initiation of a Coordinated Research, Professional, and Curriculum Development Center
7. Review the Secondary Vocational Education Program Guidelines
8. Provide Technical Assistance to Teachers, Administrators, Counselors, Student Organizations, Professional Organizations, and Other State Agencies
9. Evaluate Twenty Percent of the Secondary Carl Perkins Projects, Inclusive of Civil Rights
10. Promote the Vocational Student Organizations

11. The Office of Public Instruction Will Fulfill the Contract Stipulations By and Between the Board of Regents and the Office of Public Instruction as Specified in the Two-year Plan for Vocational Education
12. Promote the Use of and Expansion of Computer-Assisted Guidance Services and Labor Market Planning Information

Achievement of Objectives for Secondary Vocational Education:

Based on a review of the Goals and Objectives for the planning period, and of the activities and services provided by the Office of Public Instruction, the council feels the goals and objectives were adequately accomplished. The major activities involved:

- presentations by OPI staff at special education conferences emphasizing transitional opportunities;
- development of quality indicators under the vocational education opportunities programs;
- successful efforts in obtaining state funding for vocational education;
- funding of Perkins projects for special populations, technology education, distance learning, equipment purchases, professional development, curriculum, consumer homemaking, etc.;
- state sponsored activities and conferences for vocational student organizations;
- mandating eligible recipients for Perkins funds to specify competency measures;
- development of curriculum models, i.e., prevocational, articulation, and serving at-risk students in vocational education programs;
- effectively utilized the services of the Center for Vocational Education Research, Curriculum and Personnel Development for purposes of assessing competencies, follow-up studies, needs assessments, and for curriculum and professional development;
- revision of Guidelines for Administration of Secondary vocational Education programs;
- evaluation of secondary Perkins projects, inclusive of civil rights; and
- fulfilling the stipulations contained in the Contract with the Board of Regents for administration of secondary vocational education.

**POSTSECONDARY VOCATIONAL EDUCATION**

Enrollment in Postsecondary Vocational Technical Education:

Montana's public vocational technical education delivery system includes five vocational technical centers, three community colleges, and one unit of the university system which offers vocational programs below the baccalaureate level.

Enrollment in the vocational technical centers, based on credit hours, was 2,709 in 1989 and 2,435 in 1990. (These figures are based on data received from the State Board.)

Funding for Postsecondary Vocational Technical Education:

Prior to fiscal 1988, the state provided approximately 80 percent of total funding for the vocational-technical centers, with the districts providing the remainder with local voted mill levy and in-kind services. In fiscal 1988, governance of the centers was transferred to the Board of Regents, however, the statutes allowed continuance of the local voted mill levy and in-kind services through fiscal 1989. In fiscal 1990, total costs of operating the centers became the responsibility of the state, and the 1989 legislature adopted an incremental budget for the 1991 biennium to cover all the costs that became the state's responsibility.

The Montana Legislature continued to appropriate Perkins funds as part of the five vocational-technical centers' current unrestricted fund operating budgets for fiscal years 1989 - 90. The State Council addressed this issue in the annual report for 1986 - 88 and 1989 - 90, making the recommendation to the Legislature to discontinue appropriating Perkins funds to postsecondary vocational technical centers.

The State Board included the following statement in the introduction of the Instructions for Annual Application for Carl D. Perkins Vocational Education Act Appropriations for the vocational technical center for 1990:

Beginning with the program year 1990 Perkins grants awarding cycle, each of the five vocational technical centers will submit an annual application for Perkins funds up to the total amount appropriated by the Legislature for each center. These annual applications will be evaluated for compliance with federal regulations governing the use of Perkins funds and with restrictions imposed by the Board of Regents (the sole state agency). They will be further evaluated for congruence with activities under the direction of the Deputy Commissioner for Vocational-Technical Education that address program offerings within the vocational-technical system. Any further receipt of Perkins funds by the vocational-technical centers above their appropriated amounts will be as the result of open competition with all other applicants for funds through the regular Request for Proposal (RFP) process.

Representatives of the State Council, the State Board, and the Montana Vocational Association met with the Joint Appropriations Subcommittee on Finance and Claims of the 52nd Legislative Assembly, in February 1991, to answer questions regarding that portion of the Carl Perkins Vocational and Technology Act Amendments of 1990 which deals with the State Board and other requirements pertinent to the administration of Perkins funds. A bill has been introduced in the 52nd Montana Legislature which would basically prohibit use of Perkins funds to supplant state and local funding.

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### Goals for Postsecondary Vocational Technical Education:

Goals developed by the State Board as a result of joint planning for postsecondary technical and vocational education programs for 1989 - 1990 are:

1. To improve the quality of all postsecondary technical and vocational programs at the two-year and certificate levels in Montana.
2. To ensure greater educational opportunities for diverse populations of technical and vocational students in postsecondary programs.
3. To enhance the image of postsecondary technical and vocational education programs at all appropriate institutions.
4. To refine the process for administration of the Carl D. Perkins Vocational Education Act as it applies to eligible recipients in Montana.

### Achievement of Objectives for Postsecondary Vocational Technical Education:

As previously stated, the Montana Legislature designated the State Board of Regents of Higher Education as the sole state agency in 1987, with responsibility for development and implementation of the state plan with administration activities relative to the Perkins Act. As a result of the governance change, many of the goals and objectives relate to transitional issues and activities. In 1988, the Board of Regents established "a centralized coordinated system of vocational-technical education comprised of five branch campuses supervised by the Commissioner of Higher Education." During the planning period, considerable progress was made in achieving many of the plan objectives. These included:

- established consistent statewide policies for vocational technical centers;
- strengthened the academic components of postsecondary vocational technical centers by integrating various disciplines into the curriculum;
- developed role and scope statements for each Center;
- upgraded inadequate and obsolete laboratory equipment;
- developed a system to coordinate statewide planning and evaluation;
- established a Center for Vocational Education Research, Curriculum and Personnel Development;
- developed plans for articulation agreements;
- established career development programs;
- developed procedures for transfer of credit;
- developed and implemented a comprehensive strategy for marketing postsecondary vocational technical education programs;
- redesigned the request for proposals for Perkins funding;

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- allowed more time for eligible recipients to plan and develop requests for proposals;
- developed a technical assistance manual for eligible recipients of Perkins funding; and
- conducted a minimum of two technical assistance workshops each program year.

Other accomplishments during the planning period include:

- joint educational programs offered on a cross campus basis;
- study to determine the desirability and feasibility of merging or affiliating a college with a vo-tech center;
- conversion from the quarter to semester system; and
- adoption of a policy which allows vo-tech centers to submit proposals for associate of applied science degree programs.

### SECTION III

## DISTRIBUTION OF FEDERAL FUNDS FOR VOCATIONAL EDUCATION

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In accordance with Section 112(d)(3) of the Perkins Act, the State Council presents an analysis of the distribution of federal funds between secondary and postsecondary vocational education programs in the state of Montana. This analysis is based on data received from the State Board, a review of the State Plan for 1989 - 90, and the Accountability Report for those years.

#### DISTRIBUTION OF FEDERAL FUNDS BY EDUCATION LEVEL

In accordance with the state plan for vocational education, requests for proposals (RFP's) from secondary schools and postsecondary institutions are submitted to the State Board. All RFP's deemed complete and in compliance with applicable federal and/or state regulations are competitively evaluated for quality of content by a panel of readers representing both secondary and postsecondary vocational education, as well as the interested public, and funded accordingly.

The State Board reported Perkins Act projects for program year 1990 were funded in rank order by score within category, with two exceptions:

1. "Automatic" funding of those projects meeting minimum standards submitted by the five vocational-technical centers to meet their legislative appropriation of federal Perkins funds. This represented approximately 20% of the dollars available to distribute to the field.
2. Funding of statewide technical assistance project in the Office of Commissioner of Higher Education and in the Office of Public Instruction.

The distribution of Perkins funds by educational level is identified below:

	<u>FY 1989</u>	<u>%FY 89</u>	<u>FY 1990</u>	<u>%FY 90</u>
Secondary	\$2,818,166	54%	\$2,422,258	58%
Postsecondary	<u>\$2,369,293</u>	46%*	<u>\$1,747,539</u>	42%*
Total	\$5,187,459		\$4,169,797	

\* Included in the 1989 and 1990 postsecondary student projects is 4% and 3%, respectively, to support the Montana Center for Vocational Education Research, Curriculum and Personnel Development at Northern Montana College.

The State Council feels the distribution of federal vocational funds to secondary schools and postsecondary institutions, are reasonable and funded projects are consistent with statewide goals.

TABLE 1

FEDERAL FUND ALLOCATIONS FOR FY 1989  
TOTAL AVAILABLE -- \$6,486,489

	Projects	Available Funds	Expenditures	Balance
FY 89 Grant Award		4,184,376		4,184,476
FY 88 Carryover		2,302,113		6,486,489
Vo-Tech Centers	39		900,483	5,586,006
Secondary Vo-Ed	188		2,248,133	3,337,873
Apprenticeship	15		49,661	3,288,212
University System	21		466,240	2,821,972
State Institutions	9		102,726	2,719,246
Community Colleges	10		216,186	2,503,060
Native American CC	26		486,555	2,016,505
Other	38		717,475	1,299,030
State Admin.			307,677	991,353
Unallocated			991,353*	
TOTALS	346	6,486,489	6,486,489	

TABLE 2

FEDERAL FUND ALLOCATIONS FOR FY 1990  
TOTAL AVAILABLE -- \$5,322,003

	Projects	Available Funds	Expenditures	Balance
FY 90 Grant Award		4,330,650		4,330,650
FY 89 Carryover		991,353*		5,322,003
Vo-Tech Centers	43		895,680	4,426,323
Secondary Vo-Ed	169		1,938,175	2,488,148
Apprenticeship	13		37,389	2,450,759
University System	14		312,648	2,138,111
State Institutions	5		56,328	2,081,783
Community Colleges	7		143,261	1,938,522
Native American CC	13		184,996	1,753,526
Other	34		601,320	1,152,206
State Admin.			320,221	831,985
Unallocated			831,985*	
TOTALS	298	5,322,003	5,322,003	

\* See explanation of the unallocated/carryover amounts on next page.

## ALLOCATION OF BASIC STATE GRANT

Table 3 shows actual expenditures for secondary and postsecondary vocational education for Title II and III of the basic state grant:

TABLE 3

	<u>Secondary</u>	<u>Postsecondary</u>	<u>Total</u>
<u>Title II, Part A:</u>			
Fiscal Year 1989	\$1,843,874	\$1,275,824	\$3,119,698
Fiscal Year 1990	1,466,115	687,716	2,153,831
<u>Title II, Part B:</u>			
Fiscal Year 1989	770,951	1,080,277	1,851,228
Fiscal Year 1990	700,779	1,043,331	1,744,110
<u>Title III:</u>			
Fiscal Year 1989	203,341	13,192	216,533
Fiscal Year 1990	255,364	16,492	271,856
<u>Totals:</u>			
Fiscal Year 1989	\$2,818,166	\$2,369,293	\$5,187,459
Fiscal Year 1990	2,422,258	1,747,539	4,169,797

A review of Perkins Act expenditure statements provided by the State Board and from the State Plan indicated the distribution was in accordance with expenditure of basic grants for state funding of vocational education established in the Perkins Act.

Table 1 and 2 on the preceding page indicates the total Perkins funds available for distribution in fiscal years 1989 and 1990 and a breakdown of expenditures to secondary schools, postsecondary institutions, state agencies, and administration. These figures were provided by the State Board, and show actual expenditures in each of the fiscal years.

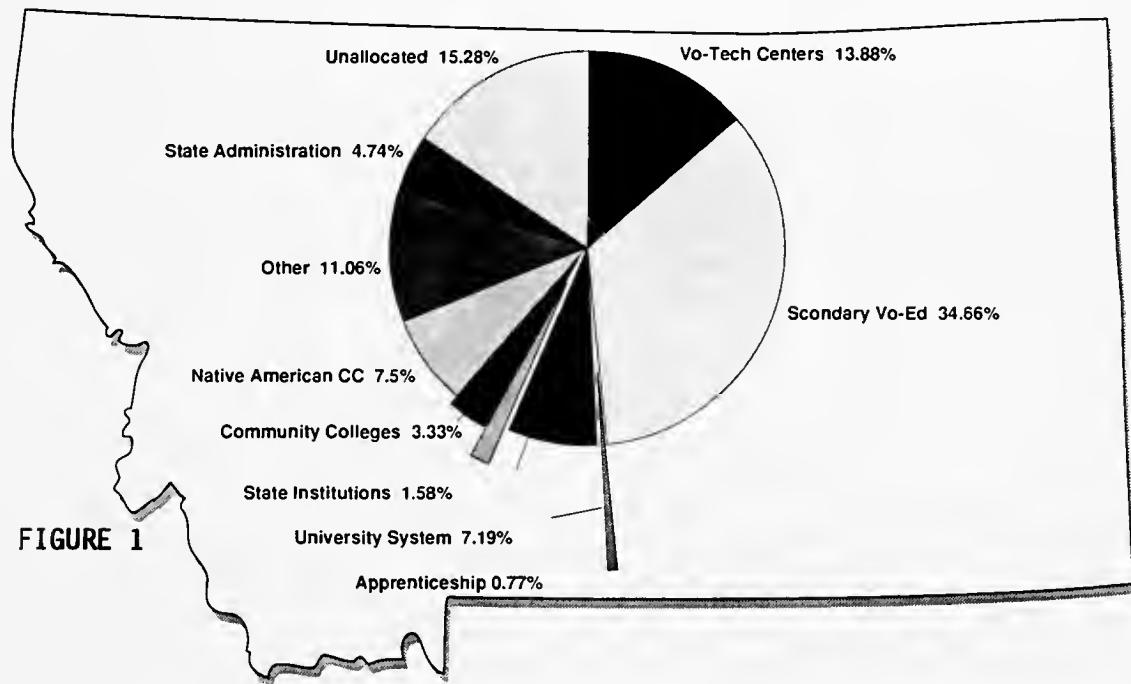
\* Unallocated and carryover amounts reported in Table 1 and 2 are estimated and may be revised following amendment of the State Board's final status reports.

The amended reports and figures will be reviewed by the State Council when received. Reasons for these discrepancies were explained by the State Board staff as follows: personnel changes; interpretation of prior expenditures; and utilization of carryover funds. Due to distribution/accounting procedures established by the State Board, complete data relating to utilization of carryover funds will be available for analysis as they are distributed. Federal law (Tidings Amendment) requires states to expend federal funds within a twenty-seven month period following receipt of a fiscal year grant award.

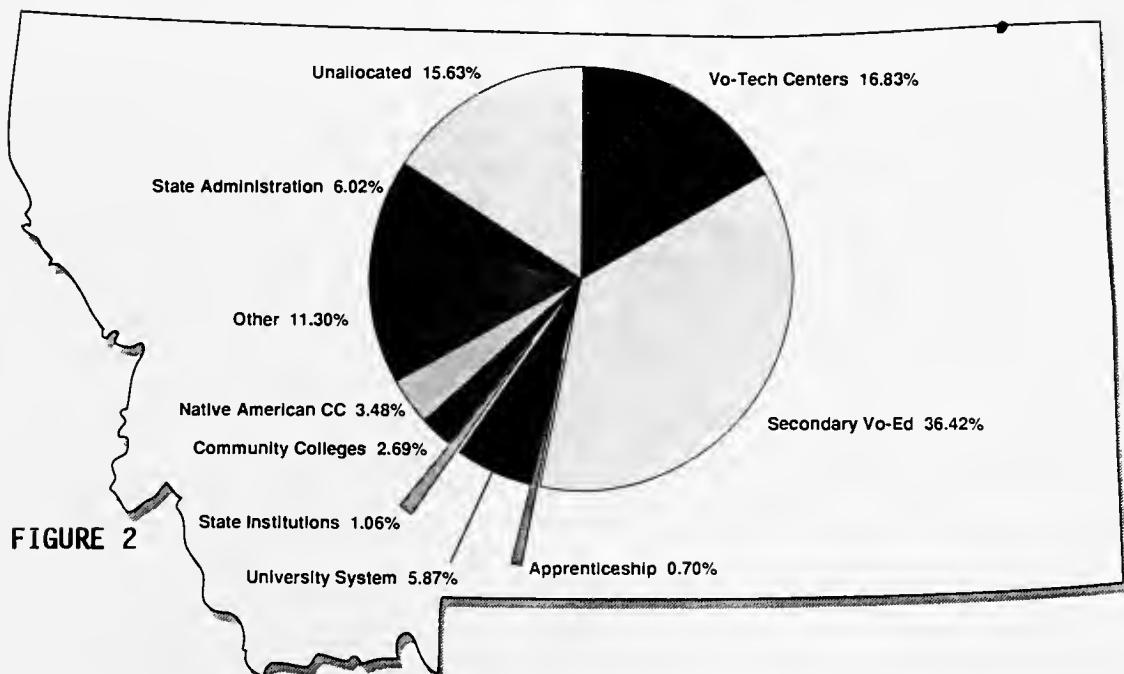
## FEDERAL FUNDS AVAILABLE FOR VOCATIONAL EDUCATION

See Figure 1 and 2 below for the percent of Perkins funds (amounts are taken from Table 1 and 2, page 13) distributed for vocational education to the agencies/institutions which are identified .

### ***Fiscal Year 1989***



### ***Fiscal Year 1990***



## SECTION IV

### BASIC STATE GRANT FOR VOCATIONAL EDUCATION

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This section contains an overview and summary of projects and expenditures for Title II A, Vocational Education Opportunities, Title II Part B, Vocational Education Program Improvement, Innovation and Expansion, and Title III, Special Programs for FY 89 and 90. Financial information reported in this section was obtained from the State Board's annual performance reports and the Montana State Plan for Vocational Education and project proposals.

The State Board and the Office of Public Instruction distributes appropriate application materials to eligible recipients. This involves a letter outlining the application procedure, request for proposal form and a procedures manual. The procedures manual addresses questions most commonly asked and includes instructions for completing the application. Additional assistance is provided to eligible recipients through technical assistance on an individual basis or through proposal writing workshops conducted by the Sole State Agent and Office of Public Instruction.

#### **TITLE II PART A - VOCATIONAL EDUCATION OPPORTUNITIES**

In accordance with the Carl Perkins Vocational Education Act of 1984, 57% of the grant monies must be allocated among the six specific target groups addressed in Title II Part A. The target groups are:

Handicapped Individuals	10%
Disadvantaged Individuals	22%
Adults in need of Training and Retraining	12%
Single Parents or Homemakers	8.5%
Participants in Programs to Eliminate Sex bias and Stereotyping	3.5%
Criminal Offenders in Correction Institutions	1%

Information for this section of the biennial evaluation report has been obtained through interviews with staff members of the State Board and Office of Public Instruction, by reviewing a random sampling of project proposals, final reports, and on-site evaluation reports of the two agencies, reviewing publications pertaining to the implementation of the Perkins Act, the law itself, Montana Vocational Education State Plans for 1989 - 90 and 1991 - 92, previous Biennial Reports published by the Montana Council on Vocational Education, the State Board's Annual Performance Reports and other resource materials.

In fiscal year 1989, projected grant monies for Title II Part A amounted to \$2,100,582. A carry over of \$1,443,938 from previous years made the sum of \$3,544,520 available for the funding of projects. Breaking this amount down into the required categories, the following monies were available:

**Table 4**  
**FY 89 Monies Projected to be Available by Categories**

	Estimated Carry Over	Projected FY 89 Allotment	Total
Handicapped	\$ 359,617	\$ 368,523	\$ 728,140
Disadvantaged	1,000,600	810,751	1,811,351
Adult Training	57,550	442,228	499,778
Single Parent	20,132	313,245	333,377
Sex Equity	2,745	128,983	131,728
Correction	3,294	36,852	40,146
<b>TOTAL:</b>	<b>\$ 1,443,938</b>	<b>\$ 2,100,582</b>	<b>\$ 3,544,520</b>

All figures taken from State Plan for Vocational Education,  
Fiscal Years 1989 - 1990 pg 161.

Table 5 identifies the amount of money actually allocated in the various categories as well as the percentages of funds allocated for secondary and postsecondary projects.

As indicated on this table, 2% of the funds were not allocated in Fy 89. These funds were located in the handicapped and adult categories. The disadvantaged category was over allocated by \$4,070. However, as referenced in Table 6, the amount actually spent on projects within this category was \$1,513,465 (\$925,569 + \$587,896). This can be accounted for since two projects were not conducted and some projects did not use all the monies allocated to them.

**Table 5**  
**FY 89 Monies Projected to be Available and Allocated**

Categories:	Amt Available <sup>1</sup>	Amt Allocated <sup>2</sup>	% of Available Funds Allocated		
			Sec	Psec	Unalloc
Handicapped	\$ 728,140	\$ 686,491	76%	18%	6%
Disadvantaged	1,811,351	1,815,421	65%	35%	0
Adult Training <sup>3</sup>	499,778	462,417	65%	28%	7%
Single Parent	333,377	332,772	3%	97%	0
Sex Equity	131,728	131,728	36%	64%	0
Corrections	40,146	40,146			
<b>TOTAL</b>	<b>\$ 3,544,520</b>	<b>\$3,468,975</b>			
Funds not allocated \$83,026 = 2%					

1 Refers to page 161  
State Plan for Vocational Education - Fiscal Years 1989 - 1990  
2 Figures provided by the State Board.  
3 Apprenticeship programs included.

Table 6  
FY 89 Title II Part A

Funding Categories	Projects Conducted Sec. Psec.	Number Served Sec. Psec.3	Amt Approved by State Board4 Sec. Psec.	Amt Spent5 Sec. Psec.	Cost per Student6
Handicapped	32	8	1060	1121	\$ 556,931
Disadvantaged	53	28	45221	3187	\$ 1,177,400
Adult Training <sup>2</sup>	28	4	1437	1363	\$ 321,951
Single Parent	1	18	27	1028	\$ 10,160
Sex Equity	1	5	44	1043	\$ 47,986
Correction		2		334	\$ 40,146
<b>Total:</b>	<b>115</b>	<b>65</b>	<b>7090</b>	<b>8076</b>	<b>\$2,114,428</b>
					<b>\$1,354,277</b>
					<b>\$1,812,643</b>
					<b>\$1,298,684</b>
					<b>205</b>

- 1 Count includes LEP students
- 2 Includes apprenticeship programs
- 3 Enrollment according to funding category (secondary, postsecondary)
- 4 Figures provided by the Board
- 5 Figures taken from 1989 Performance Report
- 6 Based on amount spent

Table 6 provides an overview of all projects for FY 89. A total amount of \$3,111,327 was spent in 180 projects serving 15,146 students. The majority of these projects were located within the handicapped and disadvantaged categories. Also, the majority of monies and projects were allocated to and conducted by secondary school districts. Not all of the students served by these programs fall within the definition of secondary students. Montana State Law 39-6-103 MCA designates the Office of Public Instruction as the responsible agency for all apprenticeship programs. Hence, the reporting of these projects falls within the adult secondary category. Also, many adult programs are conducted by the adult education department of secondary schools.

Of all the projects conducted in FY 89, 104, or 57%, were awarded to secondary school districts. Native American Community Colleges conducted 24 projects, or 13%, Community Based Organizations 22 projects, or 12%, and the rest of the projects were conducted by Vocational Technical Centers, 10 projects, or 6%.

In 1990, the projected grant monies for Title II Part A amounted to \$2,173,813. A carry over of \$227,499 from previous years made the sum of \$2,401,312 available for funding of projects in this section of the Act. Breaking this amount down into the required categories, the following monies were projected to be available:

Table 7  
FY 90 Monies Projected to be Available by Categories\*

Category	Estimated Carry Over	Projected FY 90 allotment	Total
Handicapped	\$ 66,511	\$ 381,371	\$ 447,882
Disadvantaged	77,217	839,015	916,232
Adult Training	79,999	457,645	537,644
Single Parent	0	324,165	324,165
Sex Equity	1,561	133,480	135,041
Corrections	2,211	38,137	40,348
<b>Total:</b>	<b>\$ 227,499</b>	<b>\$ 2,173,813</b>	<b>\$ 2,401,312</b>

\* All Figures taken from page 104 State Plan for  
Vocational Education, FY 91 - 92

Allocating this amount to the required categories, the following monies were available:

Table 8  
FY 90 Monies Projected to be Available and Allocated

Categories	Amt Avial	Amt Alloc	Percentage Sec.	Allocated Psec.	Allocated Unalloc
Handicapped	\$ 447,882	\$ 445,553	90%	9%	1%
Disadvantaged	916,232	851,194	79%	13%	8%
Adult Training	537,644	523,282	63%	37%	0
Single Parent	324,165	331,639	13%	89%	0
Sex Equity	135,041	135,404	64%	36%	0
Corrections	40,348	38,233		95%	5%
<b>Total:</b>	<b>\$ 2,401,312</b>	<b>\$ 2,325,305</b>			

Funds not Allocated = \$76,007 = 3%

1 Refer to page 104 State Plan for Vo-Ed  
Fiscal Year 1991 - 1992

2 Refer to Appendix P  
State Plan for Vocational Education FY 1991 - 1992

3 Apprenticeship programs included

Table 8 identifies the funds actually allocated in the various categories as well as the percentage of funds allocated for secondary and postsecondary projects. This table also indicates \$76,007 was not allocated. Single Parent/Homemaker category was over allocated by \$7,475. As indicated in Table 9, the actual amount spent in this category was \$323,210. This can be accounted for by the fact several projects did not spend all of the funds allocated to them.

Table 9 provides an overview of all projects for FY 90. A total amount of \$2,325,306 was allocated to 142 projects serving 13,438 students. In FY 90, eighty-four projects were awarded to secondary school districts (57%), vocational technical centers received funding for 13 projects (9%), 3 projects were conducted within the University System (2%), 1 project was awarded to a state institution, Community Colleges were awarded 4 projects (4%), Native American Community Colleges conducted 9 projects (6%), Community Based Organizations, 17 projects (12%) and 9 projects (6%) were awarded to other eligible recipients.

Table 9  
FY 1990 Title II Part A

Categories	Funded Projects Conducted Sec. Psec.	Number Served Sec. Psec.3	Amt. Approved4 Sec. Psec.	Amt. Spent5 Sec. Psec.	Cost Per Student6
Handicapped	34 6	1224	\$ 405,020	\$ 368,851	\$ 40,533
Disadvantaged	34 14	3484	\$ 14531	\$ 728,106	\$ 674,749
Adult Training <sup>2</sup>	21 8	898	1704	327,489	123,088
Single Parent	2 16	77	688	195,793	123,485
Sex Equity	3 3	3220	43,749	287,891	219,219
Correction	0 1	243	86,096	49,308	192,808
Total:	94 48	8906	4532	\$1,590,460	\$1,466,115
1	Included LEP programs				
2	Includes apprenticeship programs ( No. Students = 214 , Amt. spent = \$37,389 , Cost Per Student = \$175)				
3	Enrollment according to funding category (secondary, postsecondary)				
4	Figures taken from Montana State Plan for Vocational Education 1991 - 1992				
5	Figures taken from Annual Performance Report for State of Montana				
6	Based on amount spent				

## HANDICAPPED CATEGORY

Total handicapped allotment for Fy 89 was \$686,491, funding 34 projects at the secondary level and 8 projects at the postsecondary level. Only 32 of the secondary projects were conducted. These 40 projects served 2161 students at a cost per student of \$298. At the secondary level, \$525,788 served 1060 students at a cost of \$596 per student. The cost per student at the postsecondary level was \$111, where 1121 students were served at a cost of \$129,560.

The following identifies the prime activity or component of these projects. The majority of equipment purchased were computers. Teachers aides and interpreters for deaf students were provided, and one project utilized the funds to make a vocational program accessible to a physically handicapped student's needs.

### **Components FY 89 Handicapped Projects**

Support Personnel	2
Equipment	11
Transportation	2
Programming	1
Curriculum	5
Counseling/Assessment	13
Employment Placement	2
Basic Skills	1
Work Experience	9
Other	2

In Fy 90, the total handicapped funds amounted to \$445,553 and served 1451 students. Cost per student was \$301. Thirty-five secondary projects were funded, and allocated funds were \$405,020. Only 34 projects were conducted at a cost per student of \$301. Six postsecondary projects were funded with \$40,533. These projects served 233 students at a cost of \$174 per student.

The following identifies the components addressed in these handicapped projects.

### **Components FY 90 Handicapped Projects**

Support Personnel	4
Equipment	7
Transportation	2
Day Care	1
Programming	2
Curriculum	2
Counseling/Assessment	3
Employment Placement	2
Follow-up	1
Coordination with Other Service Providers	1
Basic Skills	1
Work Experience	9
Other	6

Many projects provided assessment services to the students followed by job sampling experiences. A statewide project provided the opportunity for sessions addressing "School to Work Transition Programs" which were presented at the 1990 State Special Needs Conference.

#### DISADVANTAGED CATEGORY

Included with this category are projects considered Limited English Proficiency Projects (LEP).

In FY 89, set asides for the disadvantaged category amounted to \$1,811,351; \$1,815,421 was appropriated to support 81 projects serving 7709 students. The cost per student was \$196. Twenty-eight postsecondary projects were allocated \$587,896, serving 3187 students, at a cost per student of \$184. Fifty-three secondary projects were allocated at \$925,569, serving 4522 students at a cost per student of \$205.

The following identifies the main components of these projects.

#### **Components FY 89 Disadvantaged Projects**

Support Personnel	6
Equipment	34
Day Care	3
Facilities	1
Programming	2
Curriculum	11
Counseling/Assessment	24
Employment Placement	5
Coordination with Other Service Providers	2
Basic Skill	11
Work Experience	10
Other	1

Many projects address more than one component. Thirty-four projects were involved in equipment purchase, a number of these projects utilized funding for computers and accessory purchases. Child care was provided for disadvantaged students in 3 postsecondary projects.

Eight LEP projects were included in this funding category and served 341 students.

In FY 90, the disadvantaged funds amounted to \$916,232 of which \$851,194 was allocated. Forty-eight projects were funded serving 4940 students at a cost per student of \$161. Thirty-six secondary projects were approved, but only 34 were conducted. These projects were allocated \$674,749, serving 3487 students at a cost per student of \$194. Fourteen postsecondary projects were funded at a cost of \$123,485 serving 1453 students. Cost per student was \$85.

The following identifies the main components of these projects.

#### **Components FY 90 Disadvantaged Projects**

Instructional Personnel	6
Support Personnel	2
Equipment	15
Programming	1
Curriculum	10
Counseling/Assessment	19
Employment Placement	3
Coordination with Other Service Providers	3
Basic Skills	13
Work Experience	4
Other	5

Curriculum development was emphasized in several projects. A community college used their allocated funds to revise a course in math for medications to assist disadvantaged students in their Associate Degree Nursing program.

Five LEP projects were conducted at the secondary levels serving 400 students.

#### **ADULTS IN NEED OF TRAINING OR RETRAINING**

The Carl D. Perkins Act specifies that 12% of Title II Part A funds shall be available for this category. According to the State Board's definition, this category included individuals who are above the compulsory school age and who fit into one of the following categories.

- persons who have graduated from or left high school and who are in need of additional vocational education so that they may enter the workforce;
- unemployed persons who are in need of vocational training so that they may successfully gain employment or increase their chances for employment;
- employed persons who require additional vocational training so that they may retain their jobs or who need such training so that they may qualify for higher paid or more dependable employment;
- displaced homemakers and single heads of households who are entering or reentering the workforce;
- persons who are in need of vocational training so that they may seek new employment opportunities or who need retraining in new skills which are required as a result of technological advances; and
- workers who are 55 years of age or older.

The State Board has further identified the allocations may be utilized to support the following activities:

- programs or projects which provide for, improve, or expand postsecondary vocational education services and opportunities at all institutional levels for the training or retraining of adults (including programs for older adults and displaced homemakers);
- additional training under Title II of the Job Training Partnership Act (JTPA);
- costs of serving adults in other vocational education programs (including such costs as keeping educational facilities open for longer periods of time);
- organized programs designed for individuals who have completed or left high school and in which credit may be awarded toward a degree at the associate (but not baccalaureate or higher degree) level;
- adults who have already entered the labor market or who have already completed or left high school and are enrolled in vocational education programs not otherwise supported by other P.L. 98-524 monies.

Also, Montana State Law 39-6-103 MCA designates the Office of Public Instruction as the responsible agency for all Apprenticeship programs. Hence, reporting of these programs will be included in the secondary category.

In FY 89, 32 projects were supported. These programs were allocated \$462,147 and served 2800 students at an average cost of \$158 per student.

Of these 32 approved projects, twenty-eight were conducted at the secondary level. Fifteen of these projects were apprenticeship projects, but only 13 were conducted. Allocation for these projects were \$49,661 serving 141 students at an average cost per student of \$352. Approximately 15% of the allocated secondary monies supported these apprenticeship projects.

The remaining 17 secondary projects conducted in this category were allocated \$252,503 serving 1296 participants. The average cost per student was \$158 (Table 6). The majority of these 17 projects had the objective of upgrading Journeyman skills. Two projects were designed to assist small businesses in utilizing computers and providing support services. The purpose of one program was to upgrade the teaching skills of instructors, Journeymen and apprenticeship programs. Main components addressed in these projects were to fund instructional and support personnel, and purchase equipment.

In FY 90, \$523,282 were appropriated supporting 29 projects, serving 2602 students. Average cost per student was \$189 (Table 6). Thirteen

apprenticeship projects were approved at the secondary level. Allocated funds for these projects were \$37,389 and served 214 students at an average cost per student of \$175. These apprenticeship projects utilized approximately 71% of the allocated funds at the secondary level within this category.

Eight other secondary adult projects were conducted. These projects expended \$260,830 serving 684 students at an average cost per student of \$381.

Eight postsecondary projects served 1704 students expending \$192,808. The average cost per student was \$113. These projects addressed developing or upgrading of employable skills, several provided individual instruction in basic skill building course development, and instructional and support personnel. Equipment and material purchases were the main components in these projects.

#### CRIMINAL OFFENDERS IN CORRECTIONAL INSTITUTIONS

Only 1% of the Carl Perkins Title II Part A funds are allocated for the conducting of projects in this category. In FY 89, this amount was \$40,146. These funds were allocated to two postsecondary projects serving 334 students at an average cost per students of \$114 (Table 6).

In FY 90, \$38,233 was allocated to one project which was conducted at a halfway house and provided assessment, job readiness and work experience for 243 participants at an average of \$157 per student (Table 9).

#### SINGLE PARENT AND SEX EQUITY

The next two categories supported by the Carl Perkins Title II, Part A monies are administrated by the Human Resource Department Officer (HRDO) who is an employee of the State Board. Postsecondary projects are managed solely by the HRDO while secondary projects are managed by the designated employee of the Office of Public Instruction under the direction and in consultation with the HRDO.

##### Single Parent/Homemaker:

According to the HRDO, Montana uses a unique delivery system for the Single Parent/Homemaker set asides. The thirteen Displaced Homemaker Centers established throughout Montana participate on a competitive basis with all other projects received for these set asides, but preference is given to services provided by these centers. The majority of these projects were awarded to these centers. An interesting fact about these centers is that they fund their activities with a combination of federal, state, and local funds, hence a coordinated and cooperative approach is used to provide services to their clients.

In FY 89, \$332,772 were allocated and supported 19 programs serving 1055 students. The average cost per student was \$317. One project was

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funded at the secondary level. The cost of this project was \$10,136 and served 27 students. The average cost per student was \$375. This project was awarded to a small school district and provided word processing training to the participants.

Eighteen projects were funded at the postsecondary level at a cost of \$322,612. These projects served 1028 students at an average cost per student of \$314. One project funded at the postsecondary level was conducted at a Tribal Community College, three at the state supported community colleges, and 14 were awarded to Community Based Organizations.

In FY 90, 18 projects were funded serving 765 students. The amount allocated to these projects was \$331,640. The average cost per student was \$422. Two of these projects were conducted at the secondary level, serving 77 students and utilizing \$43,479 of allocated funds. The average cost per student was \$565. One secondary project provided day care services for the single parent students to assist them in finishing high school. The second project provided adults access to evening vocational and pre-vocational training.

Sixteen projects were funded at the postsecondary level. These projects were allocated \$287,891, and served 688 students. The average cost per student was \$407. Two projects were located at state supported Community Colleges, one at a Tribal Community College and 13 at Community Based Organizations. A range of activities were provided by these projects: child care, guidance and counseling services, upgrading of employable skills and computer training.

#### Sex Equity/Stereotyping:

Allocations for FY 89 for this section of Title II, Part A was \$131,728. These monies supported 6 projects serving 1087 students. The average cost per student was \$121. One project was funded at the secondary level and five at the postsecondary level. Four postsecondary projects were awarded to Community Based Organizations, and one to a state supported four year institution. The purpose of these 5 programs was to develop and disseminate informational material relating to careers in agriculture.

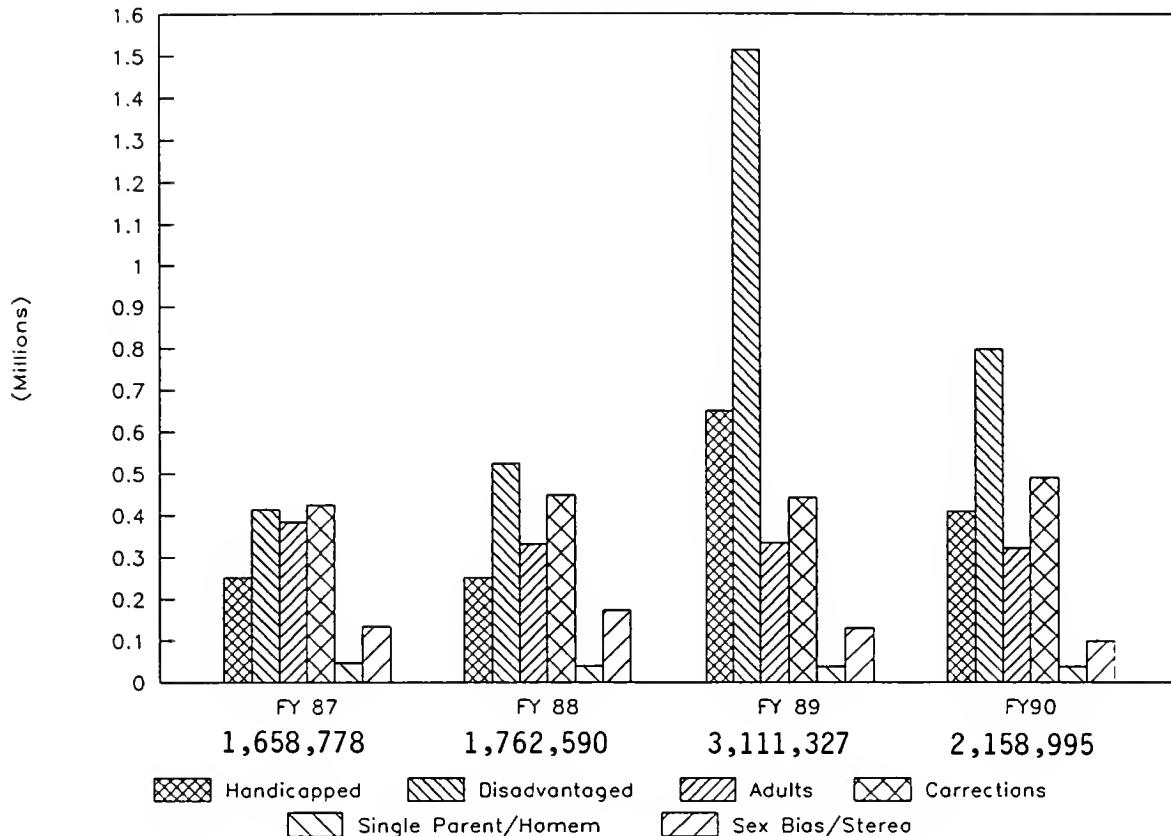
In FY 90, allocations were \$135,404. Six projects served 3431 students at an average cost per student of \$129. Two of these projects were conducted at state supported four year institutions, 2 at Community Based Organizations, 1 at a secondary school, and 1 at a Tribal Community College. Only 5 projects were conducted due to lack of enrollments in a non-traditional program developed for women at the Tribal Community College. One project provided a sex equity and gender bias seminar for faculty and administrators. One provided actual skill training in computer science and the other projects were targeted to provide guidance and counseling to the students.

### GENERAL COMMENTS

Figure 3, which appears below, provides an overview of expenditures for Title II Part A for FY 87-90.

FIGURE 3

FY87-90 EXPENDITURES FOR TITLE IIA



The total number of students served by these set asides:

	Secondary	Postsecondary	Total
FY 87	1,004	12,473	13,477
FY 88	2,181	8,744	10,925
FY 89	5,550	10,652	16,202
FY 90	8,906	4,532	13,438

The total number of projects conducted with these set asides:

FY 87	123
FY 88	132
FY 89	180
FY 90	142

In analyzing the cost per student of all the Title II, Part A projects for FY 89, FY 90, the most expensive projects were the Single Parent/Homemaker projects. One could assume this fact may be due to the small

enrollments in some classes and that many of the services provided by the Community Based Organizations, CBO's, are spread over several counties for which the organization is responsible. Also, concentrated assessment and counseling services are necessary to assist adults who have been out of the work force for many years.

One pertinent question which arises when reviewing the Title II Part A projects, is what effect these set asides have had upon vocational education programs and services provided to the designated special populations. Only 20% of all of the Title II projects are required to be evaluated each year.

The Office of Public Instruction evaluates the secondary Title II projects at the same time they conduct their evaluation of all vocational education programs offered by the school. Hence, much of the evaluation information pertaining to the Title II project(s) is contained throughout their total report and is sketchy.

The State Board is responsible for evaluating postsecondary projects. Their method is to evaluate the projects after the project is completed. During these on-site visitations, the final fiscal report is audited as well as the final project report submitted by the school.

The final project report, which is required of all projects, and which are contained in the project's file, are very brief and contain little narrative information regarding actual strengths or weaknesses of the project.

Several of the FY 90 Title II Part A projects were continuations of projects conducted in past years. The project applications for the continuation of the projects contained little justification for continued funding.

Hence, determining the actual impact of Title II Part A set asides upon the special needs population within secondary schools or the vocational technical education system is difficult.

## **COMMENDATIONS AND RECOMMENDATIONS FOR TITLE II PART A**

### **COMMENDATIONS:**

1. The State Board and the State Office of Public Instruction are to be commended for equitably spreading a limited amount of resources across a substantial variety of activities serving the special needs population in Montana.
2. The State Board is to be commended for the system they have established to review and score the grant applications received for Title II Part A funds.
3. The State Board is to be commended for the Technical Assistance Manual they have published and provided to eligible recipients.

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4. Montana's Human Resource Development Officer is commended for the 1989 Sex Equity Report which was composed and distributed and for conducting a statewide gender equity workshop.
5. Montana's Human Resource Development Officer is commended for the delivery system utilizing Community Based Organizations to provide some of the training sites for Single Parent/Homemaker projects and Sex Bias/Stereotyping projects. In this manner, several funding sources are drawn upon to serve these two populations.

RECOMMENDATIONS:

The following recommendations were formulated on the basis of observation, evaluation, and analysis of projects funded during the 1989-90 planning period. The Council encourages the State Board and the Office of Public Instruction to consider these recommendations in development of the State Plan, RFP procedures, etc., for implementation of the Carl D. Perkins Vocational and Applied Technology Amendments of 1990, P.L. 101-302.

1. A more detailed and complete final report form be developed which would require information on what activities were utilized to accomplish objectives, and the manner in which objectives were evaluated. Also, the number of specific students served by the project and the percentage this number represents of all special needs students enrolled in the school. This report could be in the form of a synopsis and hence could be disseminated in a publication to eligible recipients.
2. The State Board, in concert with the Office of Public Instruction, develop a method to follow up students supported by Carl Perkins funding. In fact, all vocational education students, secondary and postsecondary, should be included in a follow-up system.
3. The State Board, in concert with the Office of Public Instruction, design an evaluation instrument to be used during on-site evaluation which would provide complete information regarding the progress in conducting the project or in addressing the local plan. This instrument should be so designed to be used during the school year in which the project is being conducted and not after the project has been completed. State agencies could then provide technical assistance when needed, make certain federal monies are being used properly and this would assist the state agencies in fulfilling their responsibilities in the new Act.
4. The State Board disseminate to all eligible recipients information regarding innovative or adaptable programs in operation in the state, especially those projects emphasizing integration of academic and vocational curriculum.
5. Technical assistance be provided to eligible recipients in the development of measurable behavioral objectives so that there is a means of determining the success of a project and the impact federal funds have had upon the vocational education system in Montana.

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Approval of purchases of equipment should be tied very closely to acceptable objectives to be certain monies are supplementing and not supplanting other monies.

6. The State Board and Office of Public Instruction review their staffing pattern in light of the numerous responsibilities which are now required in operating and monitoring of the P.L. 101-302.

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## **TITLE II PART B**

### **VOCATIONAL EDUCATION PROGRAM IMPROVEMENT, INNOVATION AND EXPANSION**

Title II Part B of the Act allows states to use 43 percent of the Basic Grant to meet needs identified in the State Plan for expanding, improving, modernizing or developing high quality vocational education projects, services and activities. Title II B funds are awarded through the competitive grant process. Twenty percent of the Title II B funds are reserved for projects with statewide impact. The Montana Center for Vocational Education, Research, Curriculum and Personnel Development was funded from the 20 percent set asides, as was support for technical committees, support for provision of technical assistance to the field and specific projects identified in the request for proposal as targeted for statewide impact.

There is a dollar-for-dollar cash matching requirement for the use of all Title II Part B funds. Federal funds and student tuition and fees may not be used as match. The exception to the use of federal funds as match involves some federal funds transferred to the tribes. Section 109 of the Tribally Controlled Community College Assistance Act of 1978 (25 U.S.C. 1809) was amended to allow that "... funds provided under this title to the tribally controlled community colleges for purposes of any provision of Federal law which requires that non-Federal or private funds of the college be used in a project or for a specific purpose." Further, "... funds provided by the Bureau of Indian affairs for adult vocational education to any vocational school (as defined for purposes of any program of assistance to students under the Higher Education Act of 1965) may be treated as non-Federal, private funds of such school for purposes of any provision of Federal law which requires that non-Federal or private funds of such school be used in a project or for a specific purpose." (Congressional Record - House April 13, 1988 H1573)

Eligible recipients , applicants having insufficient matching funds to meet the dollar-for-dollar matching requirement for Title II B funds, may request that the balance of matching funds needed to qualify for the federal dollars requested, be provided from statewide overmatch that may be available. The statewide overmatch dollars are provided as a credit, not as an actual cash disbursement. Eligible recipients with more matching dollars available than the federal amount they request from Title II B funds are asked to provide overmatch documentation to assist eligible recipients unable to meet the matching requirement.

In Montana, Title II B funds are awarded through a competitive grant process. Twenty percent of the funds are reserved for projects with statewide impact. Title II B funds are utilized to meet the needs defined in the State Plan to:

- Expand, improve or modernize existing vocational education programs, services or activities; or
- develop high quality vocational education projects, services or activities that will provide the nation's existing and future workforce with marketable skills, improve productivity, and promote economic development.

The following tables provide statistical and financial information for Title II B projects funded during the fiscal years 1989-1990

Table 10

Title II B Funds Expended - FY 1989  
Secondary Projects\*

Projects	Num. of Proj.	Number Served	Total Served	Local Match Expend	Actual Federal Funds Expen.	Total Funds Expen.
Sec.	Sec.	Psec.				
Curriculum Develop.	4	120	2500	2620	19,731	31,231
Personnel Develop.	7	383	909	1292	88,628	90,319
Guidance	16	5589	38	5627	198,084	152,225
Other Vo-Ed Projects	39	3065	132	3197	433,386	389,672
Setasides	8	1378	2435	3813	66,824	138,735
<b>Total:</b>	<b>74</b>	<b>10,535</b>	<b>6,014</b>	<b>16,549</b>	<b>806,653</b>	<b>802,182</b>
						<b>1,608,836</b>

Title II B Funds Expended FY 1989  
Postsecondary\*

Projects	Num. of Proj.	Number Served	Total Served	Local Match Expend	Actual Federal Funds Expen.	Total Funds Expen.
Sec.	Sec.	Psec.				
Curriculum Develop.	4	1808	1808	77,542	73,983	151,525
Personnel Develop.	3	473	473	42,882	35,428	78,310
Guidance	7	1122	1122	90,950	89,458	180,408
Equip/Facil Renovation	4	2666	2666	108,356	94,288	202,644
Revit. of Business Math	2	119	119	64,567	64,566	129,133
Science	1	252	252	8,977	8,988	17,965
New Vo-Ed Programs	1	12	12	9,375	9,375	18,749
Cooperative Education	1	22	22	29,640	29,640	59,280
Prog Improv/ Expansion	16	5913	5913	407,710	398,136	805,846
Exemplary Programs	1	78	78	15,700	9,699	25,399
Setasides	9	760	760	138,134	255,009	393,143
<b>Total:</b>	<b>49</b>	<b>13,225</b>	<b>13,225</b>	<b>993,833</b>	<b>1,068,570</b>	<b>2,062,402</b>

\*Source of Information: Annual Performance Reports

Table 11

Title II B Funds Expended for FY 1990  
Secondary Projects\*

Projects	Num. of Proj.	Number Served	Total Served	Local Match Expend	Actual Federal Funds Expen.	Total Funds Expen.
Sec.	Psec.					
Curriculum Develop						
Personnel Develop	9	1684	1684	102,592	83,933	186,525
Guidance	5	2746	2746	175,731	136,523	312,254
Equipment	9	983	983	219,583	160,534	380,117
Other Vo-Ed Projects	12	1132	1132	148,984	176,606	325,590
Setasides	4	4141	4141	133,209	143,182	276,391
Total:	39	10,686	10,686	780,099	700,778	1,480,877

Title II B Funds Expended FY 1990  
Postsecondary Projects\*

Projects	Num. of Proj.	Number Served	Total Served	Local Match Expend	Actual Federal Funds Expen.	Total Funds Expen.	
Sec.	Psec.						
Curriculum Develop	4	3202	3202	229,122	133,202	362,324	
Personnel Develop	4	621	621	37,971	36,366	74,337	
Guidance	5	2078	8404	10482	119,279	238,558	
Equipment	6		2286	117,053	108,624	225,677	
Program Imp/ Develop	14	2374	2374	433,557	412,949	846,506	
Setasides	8	3786	3786	238,524	232,911	471,435	
Total:	41	2,078	20,673	22,751	1,175,506	1,043,331	2,218,837

\*Source of Information: Annual Performance Reports

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## OVERVIEW OF FY 89 AND 90 PERKINS FUNDED PROJECTS

### CURRICULUM DEVELOPMENT

#### Secondary School Projects:

agriculture education; technology education; home economics; and vocational careers.

#### Postsecondary Projects:

medical assistant/nursing placement system; revision of occupational programs to make them current with present needs of business and industry; and development of curriculum for a course in industrial materials and design applications.

Curriculum projects were also funded under the 20% set asides for state leadership/exemplary programs at the secondary and postsecondary levels.

### PERSONNEL DEVELOPMENT

#### Secondary School Projects:

handling hazardous wastes; professional development activities for Montana's vocational agriculture; technology education and home economics instruction; statewide leadership activities for vocational education; computer training for vocational education; technology education pilot programs; teacher training in the use of the career information systems; and technology education workshops.

#### Postsecondary Projects:

conference addressing technology education and rural economic development; instruction in the maintenance of digitally controlled devices; and attendance at conference addressing the application of computers to business.

### GUIDANCE

#### Secondary School Projects:

computer-assisted career information systems; development of a vocational guidance program for a rural school district; development of a video library on vocational education careers; and updating career centers and providing workshops and inservice sessions on career counseling.

#### Postsecondary Projects:

classes in communication, stress management self-esteem and personal counseling; academic advisement program; job development for placement for single parents/displaced homemakers; employability skills workshop for vocational technical students; career education services to disadvantaged students; assessment, placement and advancement programs; and a vocational education and career counseling model project.

## EQUIPMENT

### Secondary School Projects:

computer-aided drafting/design graphics; computer controlled machinery, networking and accounting systems; principles of technology class; and data processing equipment.

### Postsecondary Projects:

instructional equipment for auto body labs, nursing, business, drafting, auto mechanics, diesel, carpentry, electronics, food service, media centers, and emergency technician programs.

## STATE SET-ASIDES

### Secondary School Projects:

principles of technology; applied physics; curriculum; teacher inservice; state staff technical assistance activities; apprenticeship training via correspondence; business education curriculum guidelines; and video duplicating equipment.

### Postsecondary Projects:

Center for Vocational Education Research, Curriculum, and Personnel Development; child care payments to low income single parents enabling them to attend vocational education and career preparation classes; rural computer outreach training equity conference; meetings of 5 technical committees; conference to explore Montana's changing economy and the role of vocational technical training; telecommunications and computer literacy instruction; marketing vocational technical education; and technical assistance training sessions.

## OTHER PROJECTS

### Postsecondary Projects:

Equipment Facility Renovation - equipment to improve and expand vocational technical education programs

Revitalization of Business - safety sawyer course; management strategies for small business.

Math Science - pre-vocational mathematics

New Vo-Ed Programs - child care specialists program

Cooperative Education - learn for pay partnership programs

Program Improvement/Expansion - competency based outboard motor training course; upgraded auto mechanics course of study to meet auto service excellence standards (ASE); established career planning library; employed respiratory clinical instructor to supplement teaching staff needs for 1 year; trained and certified geriatric aides, provided staff time and resources to enable curriculum conversion from quarters to semesters; and exemplary programs for state-of-the-art CAD CAM equipment

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## SUMMARY OF TITLE II PART B FUNDS

A total of 209 title II Part B projects were funded during the planning period. These funds were a valuable resource to Montana's secondary schools and postsecondary vocational technical education institutions in meeting specified purposes of the Perkins Act and the Montana goals for vocational technical education as outlined in the State Plan.

For review and evaluation of Title II Part B, the Council reviewed appropriate sections of the Montana State Plan for Vocational Education, the Carl D Perkins Vocational Act, Montana's Technical Assistance Manual and Performance Reports. Based on these reviews, the State Council feels that projects funded in the various categories comply with intended purposes and criteria of the Act and meet Montana's Goals for Vocational Education.

Title II Part B funds have had a major impact on the State's ability to expand, improve, and modernize vocational education programs, services, and activities commensurate with existing and future workforce needs. Based on the Council's review and evaluation of Perkins funded projects, it is evident Title II Part B funds were effectively utilized to modernize and strengthen the State's vocational technical education delivery systems. (Refer to the overview of projects for FY 89 and FY 90 on the preceding pages.)

Projects funded during the planning period addressed each of the Title II Part B categories: Curriculum, Development, Personnel Development, Career Counseling and Guidance, and Program Improvement, Innovation and Expansion Activities.

Montana, like many other states, is experiencing educational reform and limited financial resources. In addition, significant changes are occurring in the workforce which necessitate continued upgrading, revision, and refinement of vocational technical education delivery systems. In this regard, Title II Part B funds have provided an essential resource to maintain relevancy between training and employer needs by insuring up-to-date curriculum and equipment, and for updating the knowledge and expertise of instructors.

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## COMMENDATIONS AND RECOMMENDATIONS FOR TITLE II PART B

### COMMENDATION:

The State Council commends the State Board and Office of Public Instruction for their efforts to refine the process for administration of the Perkins Act, i.e. redesign of RFP's, allowing additional time for recipient planning and development of RFP's, development of the technical assistance manual, and conducting technical assistance workshops.

### Recommendations:

1. The State Board and Office of public instruction examine statewide and nationally conducted needs assessments and provide for greater involvement from the private sector in establishing statewide goals, objectives, and priorities.
2. The State Board and Office of Public Instruction in cooperation with the Montana State Occupational Information Coordinating Committee should consider piloting the National Career Development Guidelines in Montana schools and postsecondary institutions.
3. The State Board and Office of Public Instruction should intensify efforts to fund professional development projects which provide preservice and inservice training for administrators, school counselors, and vocational technical education staff in the areas of career assessment, career planning and development, computerized guidance systems, and to disseminate state-of-the-art programs, techniques and methods.
4. The State Board and Office of Public Instruction involve private sector representation in the process of establishing priorities and addressing needs under Title II Part B.
5. The State Board and Office of Public Instruction validate Perkins projects for statewide adoption and transportability, publish a listing with appropriate explanation of each project, and disseminate on a statewide basis.

### **TITLE III - SPECIAL PROGRAMS**

#### **Part A: STATE ASSISTANCE FOR VOCATIONAL EDUCATION SUPPORT PROGRAMS BY COMMUNITY BASED ORGANIZATIONS (CBO's)**

Perkins funds may be used to support joint projects of eligible recipients (school districts, vocational technical centers, community colleges, tribal colleges, postsecondary educational institutions with vocational programs at less than the baccalaureate degree level) and CBO's within Montana that provide the following special vocational education services and activities: outreach programs such as transitional services, prevocational education preparation, career internship programs, assessment of student needs and vocational guidance and counseling programs:

**Table 12**

#### **Secondary and Postsecondary Vocational Education Support by Community Based Organizations Projects**

Year	Funded Proj.		No Served		Federal Funds Expended	
	Sec.	Psec.	Sec.	Psec.	Sec.	Psec.
FY 1989	1	1	124	81	\$ 20,885	\$ 13,687
FY 1990	3	1	169	176	\$ 48,674	\$ 16,492
<b>Total:</b>	<b>4</b>	<b>2</b>	<b>293</b>	<b>257</b>	<b>\$ 69,559</b>	<b>\$ 30,179</b>

Projects in this category focused on dropout intervention, career awareness and career development, job readiness, building communication skills, and preventive alternatives for at-risk youth.

#### **Part B: CONSUMER AND HOMEMAKER EDUCATION**

Funds under this section are available to states to conduct programs in economically depressed areas, encourage elimination of sex bias and stereotyping, improve, expand, and update programs, and to address priorities and emerging concerns at the state and national levels.

Table 13

Consumer and Homemaking

Year	Sec.	Psec.	Sec.	Psec.	Sec.	Psec.
1989	23		1290	1233	\$ 115,977	
1990	15		2860		103,575	
Total:	38		4150	1233	\$ 219,552	

Projects in this category focused on parenting skills development, prevocationals skills, technical sewing equipment, improving and modernizing the consumer/homemaker program, application of new technology, audio visual and software update, FHA/HERO peer educational activity, preparation of dual role as homemaker and wage earner, computer aided curriculum, and professional and curriculum development.

LEADERSHIP AND ADMINISTRATION

Funds in this section may be used to assist in providing state leadership qualified by experience and preparation in home economics education. Not more than 6% of the funds available under this part may be used to carry out leadership activities.

Table 14

Leadership and Administration

Year	Funded Proj.	No Served	Fed. Funds Expended
	Sec.	Psec.	Sec.
1989	1	275	\$ 7,824
1990	2	452	16,848
Total:	3	727	\$ 24,672

Funds were utilized in this category to infuse math and science principles into home economics, food and nutrition curriculum, professional development, and development of video tapes.

## CONSUMER HOMEMAKER/ECONOMICALLY DEPRESSED AREAS

Funds under this part may be used to assist states in conducting consumer homemaking programs. Such programs may include (1) instructional programs, services and activities that prepare youth and adults for the occupation of homemaking, and (2) instruction in the areas of food and nutrition, consumer education, family living and parenthood education, child development and guidance, housing, home management, and clothing and textiles.

TABLE 15

Consumer Homemaker/Economic Depressed Areas					
Year	Funding Proj. Sec.	No. Served Sec.	No. Served Psec.	Fed. Funds Expended Sec.	Fed. Funds Expended Psec.
1989	10	936		\$ 58,655	
1990	13	1,671		86,267	
Total:	23	2,607		\$ 144,922	

Funds for this area were used for home economics curriculum development, for updating equipment, acquisition of computers, entrepreneurial training, sewing, and food preparation training.

## SUMMARY OF TITLE III SPECIAL PROGRAMS

Based on the Annual Performance Reports for FY 89 and 90, a total of 67 projects were funded under Title III Parts A and B.

For Title III Part A, Community Based Organizations are awarded funds through a competitive grant process. There is no local matching requirement for the majority of CBO funds. However, under some circumstances, there is a requirement for dollar-for-dollar match of local administrative costs.

Community Based Organizations conducted several outstanding projects during the planning period. This involved a project conducted by the Northwest Human Resources in Kalispell which utilized the "Affective Skill Development" curriculum supplementing interactive and social responsibilities. The State Council participated in the evaluation of this project and identified it as a model for JTPA/Perkins coordination. A project conducted by the District IX Human Resources Development Council in Bozeman provided a community approach to preventive alternatives for at-risk youth. This project received national recognition as an exemplary model for JTPA/Perkins coordination. A third project which was identified as an exemplary coordination model was conducted by

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Career Futures in Butte. This project titled, "It's Your Choice" involved career awareness activities and workshops in rural areas. The project was conducted in cooperation with the Butte Vocational Technical Center.

In Montana, all funds for consumer and homemaking programs are expended at the secondary level. A total of 64 projects were funded in the three categories: depressed areas, leadership and regular. Based on a review of the projects, the Council found that most addressed program development and improvement of instruction and curriculum.

COMMENDATION:

The Council commends the State Board and the Office of Public Instruction for providing leadership and technical assistance to eligible recipients in developing many quality projects under Title III Parts A and B, particularly those having statewide application.

RECOMMENDATION:

The State Board and Office of Public Instruction review expenditure of funds for FY 89 and 90 in accordance with established goals and priorities to insure that program components are adequately met.

## SECTION V

### BUSINESS/EDUCATION COOPERATION

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In accordance with Public Law 98 - 524, States shall allocate, in each fiscal year, 43 percent of its Title II funds for vocational education program improvement, innovation and expansion. The Board may set aside and retain at the State Level up to 20 percent of such funds so programs may be conducted on a statewide basis. Title II Part B funds may be used to pay 50 percent of the costs of programs/services/activities associated with this section. Further, the Board of Regents may approve the use of Title II Part B funds for:

The improvement of quality of vocational education programs, including high technology programs which involve industry, education partnerships, apprenticeship training, and the provision of technical assistance. Improvement of programs may include:

- modifying or upgrading equipment to meet current business and industry specifications;
- acquisition of state-of-the-art equipment;
- acquisition of teaching aids;
- expanding curriculum to include new and emerging technologies;
- conducting and participating in in-service education programs designed to assist vocational educators to improve program quality;
- providing technical assistance to eligible recipients; and
- acquisition of equipment to expand vocational programs

During the planning period, two projects were funded under the Revitalization of Business Category. These involved "A Safety Sawyer Project" for major logging areas in Montana and a "Small Business Management Project" which provided instruction in the elements of owning and operating a small business. A total of 413 persons were served by these projects. No projects were funded for Business Liaison.

In addition to these projects, the State Council conducted a project in cooperation with state agencies, tribal colleges, the Montana Chamber of Commerce and the Montana Vocational Association. This project titled "A Quality Workforce: The Key to Economic Development" addressed the following goals:

- Foster a closer working relationship between vocational technical education, job training programs, and other service delivery systems;
- identify the training needs and partnerships which exist between the service delivery systems and private sector;
- identify areas where vocational technical education, job training, and other service delivery systems can enhance and more effectively contribute to Montana's economic development.

A Steering Committee was organized to plan and carry out the following project objectives:

1. Develop a handbook which addresses Montana's economy, workforce, and delivery systems and their role and contribution to Montana's economic development.
  - a. The Department of Commerce developed a succinct overview of the status of Montana's economy, economic conditions, goals, short and long range plans, and strategies for strengthening Montana's economy.
  - b. The Research and Analysis Bureau of the Montana Department of Labor and Industry developed a succinct overview of the status of Montana's workforce, demographics, labor supply and demand (particularly in those fields relating to this project), and identified skills and training employees will need.
  - c. The various delivery systems developed role, scope, and mission statements, and provided other pertinent information relative to persons served and training areas provided.
2. Conduct a survey to obtain employers' perceptions of the following: the skills desired in their employees; the essential factors for a favorable climate for economic development; the present and future role of vocational technical education, job training, apprenticeship, adult education, and human resource programs in economic development; and the changes or improvements which could be made to make these programs more responsive to economic development.
3. Conduct a survey of secondary and postsecondary vocational technical administrators and instructors, JTPA personnel, program operators, and other delivery system personnel to determine linkages or partnerships which presently exist with business and industry, and to identify how these delivery systems can be better utilized for economic development purposes.
4. Conduct a conference, forum, or symposium involving state agency personnel; vocational educators; economic development specialists; business, labor, and industry personnel; state legislators; and others in an effort to further identify and clarify the role of vocational technical education, job training, and service providers in economic development and to obtain input for strengthening and/or improving these efforts.
5. Report findings and recommendations to appropriate state and local agencies, personnel, and to the Montana Legislature.

Surveys were conducted among Montana employers, postsecondary vocational technical administrators, tribal college personnel, secondary vocational educators and job training service providers. Employers reported the following:

- 40% of the employers reported they had utilized customized training developed by vocational technical education systems.
- Reasons listed by employers for not utilizing vocational training for specific training needs, in rank order were:
  1. Courses offered were not relevant
  2. Location was not convenient
  3. A. Education or training was costly  
B. Courses were not offered when training was needed
  4. Curriculum could not be modified to meet specific needs
- Employers preferred the following preparation of employees by rank order: Vocational Education, Mathematics, English, Computers, Science, and Social Studies.
- 90% of the businesses/industries surveyed conducted training or retraining for their employees as follows: on-the-job training, 53%; off-hour, 23%; apprenticeship, 16%; disabled/special populations, 6%; dislocated workers, 2%.
- 63% of the respondents reported they would be interested in utilizing vocational technical training for employees.
- 68% of the employers reported they are involved in partnerships or linkages and reported involvement as follows: summer programs for students, 30%; cooperative training work programs, 23%; internships for students, 20%; plant tours, 11%; contracted agreements with instructors, 8%; Advisory Councils, 6%; summer job programs for teachers, 2%.

Suggestions from Employers for improving training and retraining needs were:

- make training available on-site
- vocational personnel could canvas selected industries for suggestions and curricula.
- vo-tech centers should continue training individuals with hands-on technical skills, not strive to become community colleges
- persons responsible for training should develop cooperative arrangements where students could obtain on-the-job experience.
- consult businesses and industries for input in developing training programs

Suggestions for placement of students with Montana businesses were:

- more interaction between businesses and training placement personnel
- establish an office where employees could contact students completing programs and who are interested in employment
- vo-tech centers should distribute a listing of graduates with a synopsis of experience, interests, and training

- schools, institutions, and job trainers need to provide more training emphasis in ethics, personnel theories, practices, computer applications, financial management, and psychology
- students need excellent reading and math skills, computer operator experience and/or programming, knowledge of finance economics, and basic accounting

#### **SUMMARY OF BUSINESS/EDUCATION COOPERATION:**

Based on surveys conducted by the State Council, and from testimony presented at public hearings, the Council strongly feels that vocational education should initiate efforts with business, industry and labor to form additional partnerships and linkages. On the basis of surveys conducted by the Council of secondary and postsecondary vocational education and Job Training Partnership Service providers, partnerships with business and industry presently exist. For example, postsecondary vocational educators reported the following linkages and partnerships with business and industry.

#### **Percent of Involvement**

	Significant Involvement	Some Involvement	No Involvement
Curriculum Development	100%		
Acquisition of Industrial Materials	85%	15%	
Acquisition of Equipment	88%		12%
Modernizing Facilities	76%	12%	12%
Business Education Partnership	100%		
Quick Start or Customized Training Programs	63%	37%	

Respondents to the survey reported that numerous business/industry partnerships or linkages presently exist and indicate a high level of participation.

#### **COMMENDATIONS AND RECOMMENDATIONS**

##### **COMMENDATION:**

The Council commends the State Board; the Office of Public Instruction; Montana Departments of Commerce, Labor and Industry, Social Rehabilitation Services; Tribal Colleges; Montana Chamber of Commerce; and the Montana Vocational Association for their involvement, support and assistance to the State Council in conducting a conference and project addressing training and workforce needs in Montana.

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RECOMMENDATIONS:

1. The State Council recommends that the State Board and Office of Public Instruction intensify their efforts to increase the number of Perkins funded projects between education and the private sector.
2. The State Council recommends that the State Board and Office of Public Instruction initiate an inservice project for Montana's vocational educators which provides knowledge, leadership skills, and techniques and approaches essential for working effectively with business, industry, and labor.
3. The Council recommends that the State Board and Office of Public Instruction seek to identify, through surveys and needs assessments, those Montana business and industries which desire to participate in linkages and partnerships with Montana secondary and postsecondary training systems.





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